

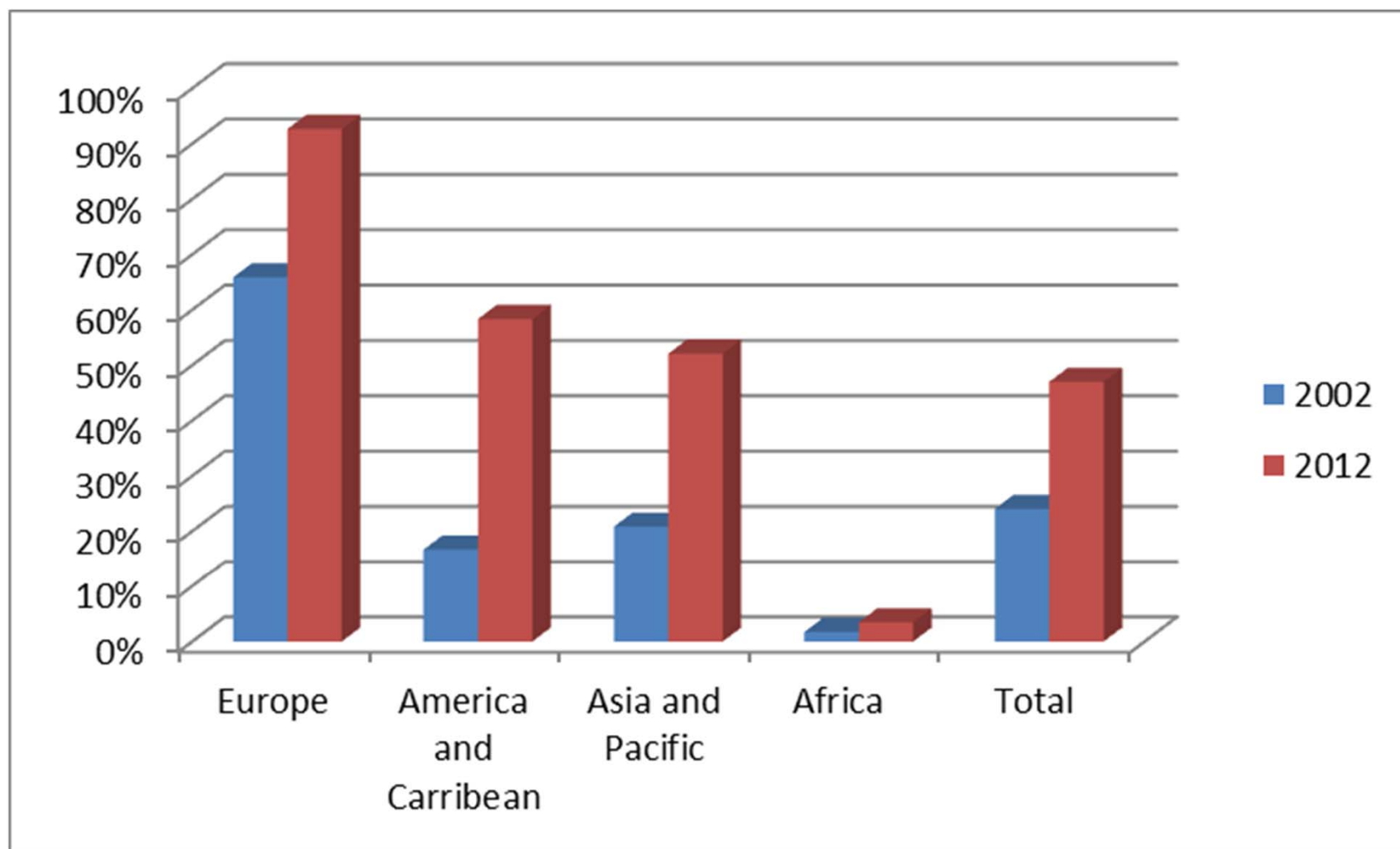


The World of Organic Agriculture: Regulations and Certification Emerging Trends 2013

› Beate Huber

Organic Regulations by Continent (2011)

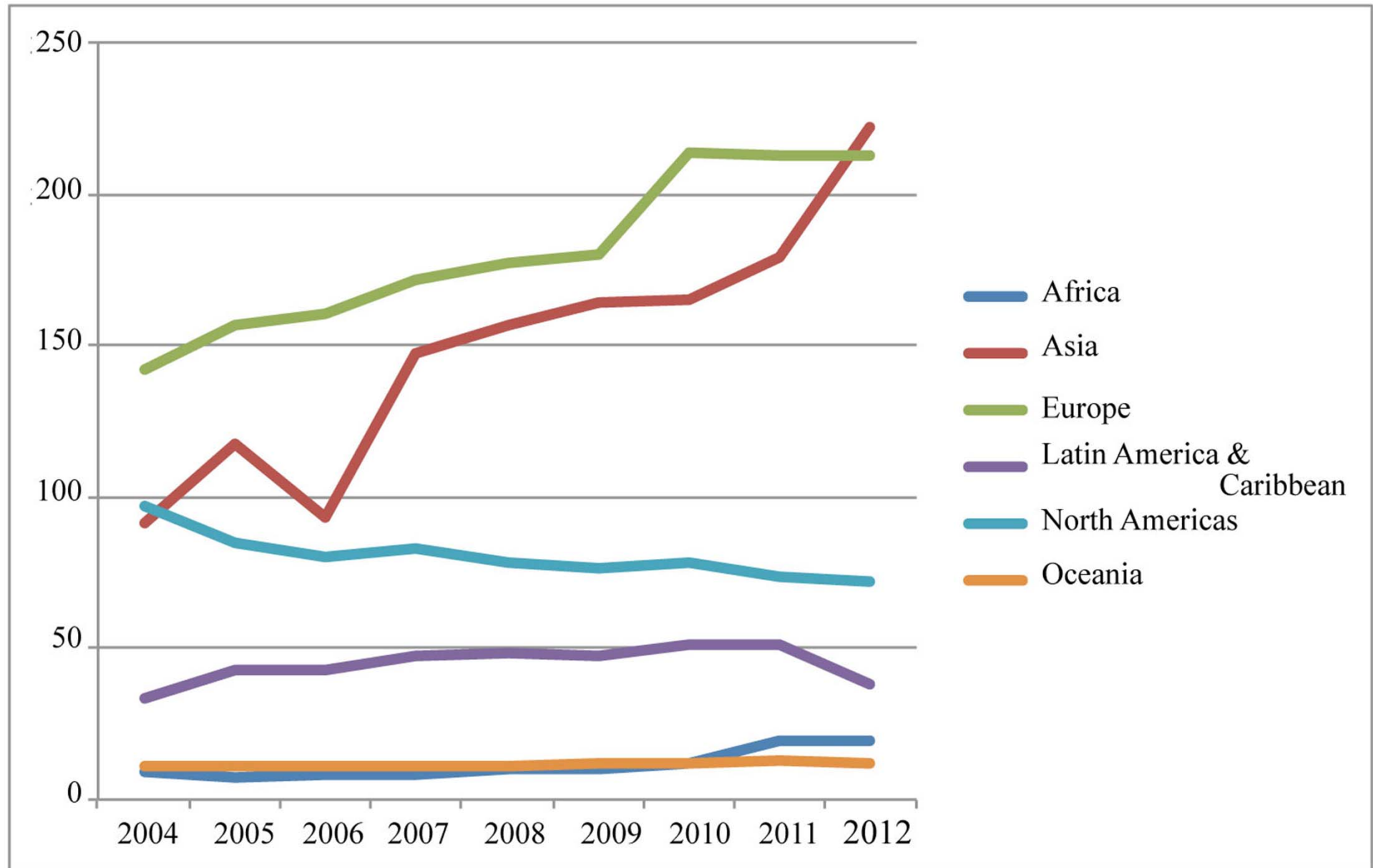
	Countries with Regulations 2002	Countries with Regulations 2012	
Europe	27	38	EU 27 Other: 11 
America and Caribbean	6	21	  
Asia and Pacific	10	25	  
Africa	1	2	
Total	<u>44</u>	<u>86</u>	



Countries Drafting Regulation

- › **Europe: Russia, Ukraine, Bosnia-Herzegovina**
- › **Asia: Bangladesh, Hong Kong, Kyrgyzstan, Laos, Nepal, Pakistan, Sri Lanka, Syria, Vietnam**
- › **America and Carribean: Jamaica, St Lucia**
- › **Africa: Egypt, Kenya, Senegal, South Africa, Tansania, Zambia, Zimbabwe**

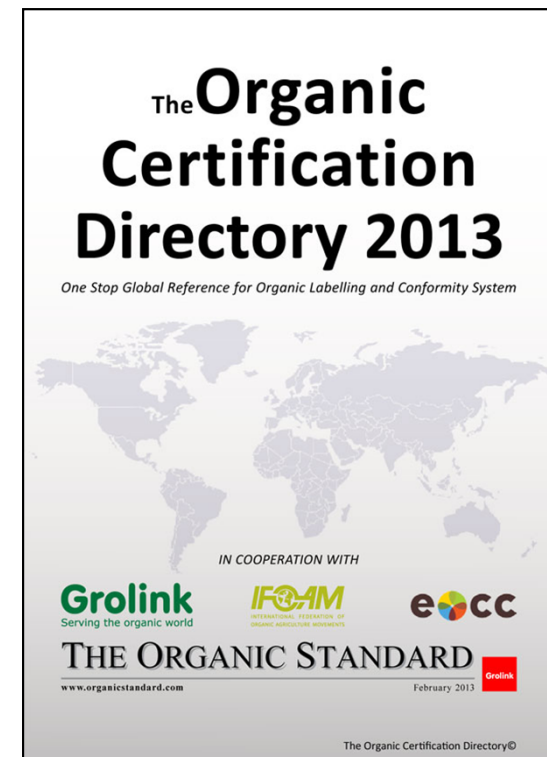
Certification bodies per region



Countries with most certifiers

Country	2012	2011	2011
South Korea	76	33	33
Japan	61	61	61
USA	49	51	51
Germany	32	31	31
Spain	27	28	28
China P.R.	24	28	28
India	24	22	22
Canada	23	23	23
Romania	17	17	17
Italy	13	13	13
Poland	11	11	11
Bulgaria	10	10	10
France	10	7	7

**The Organic Standard
Hall 4 Stand 344**

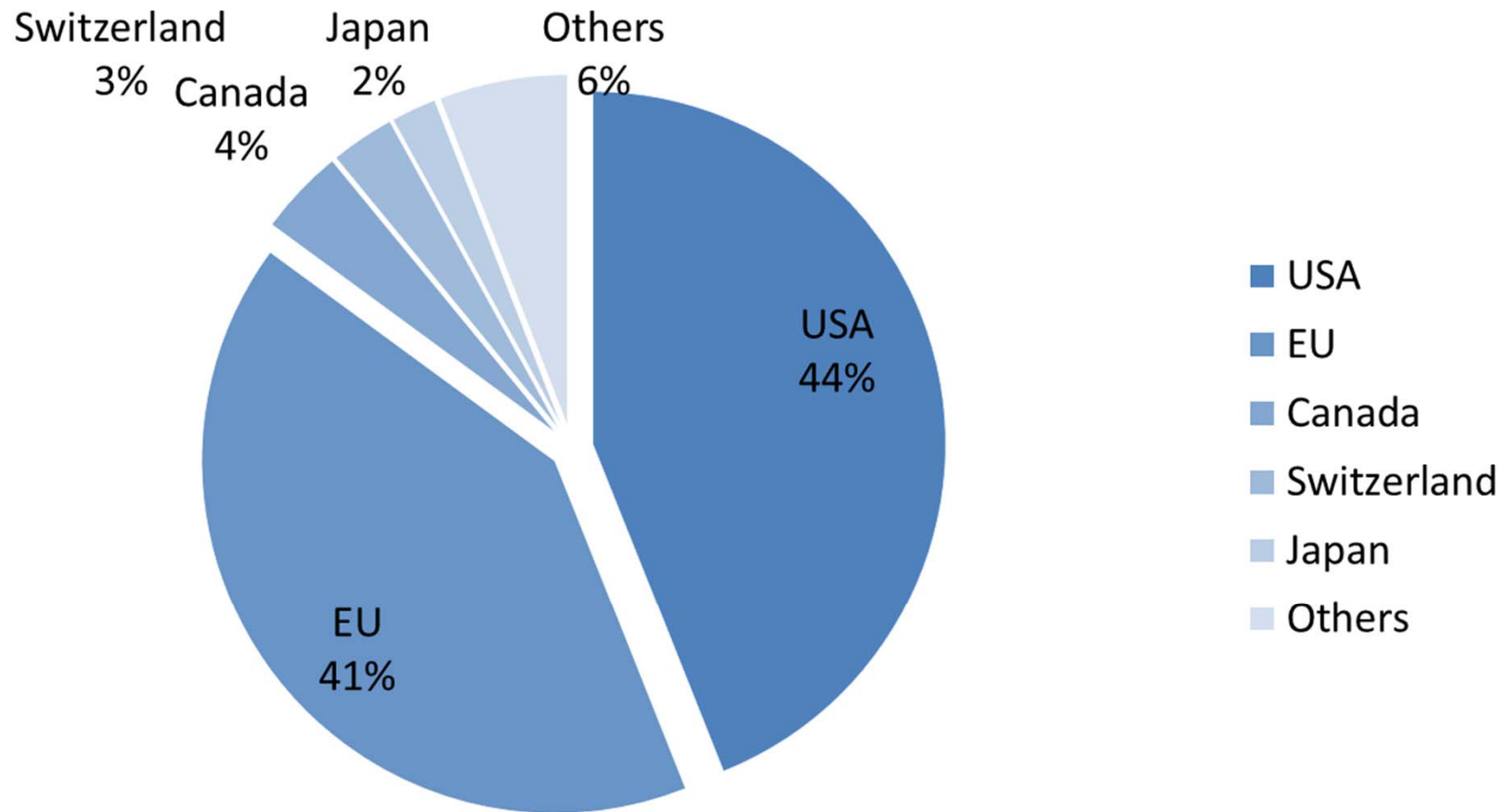


www.organicstandard.com/directory
FiBL www.fibl.org

THE ORGANIC STANDARD
www.organicstandard.com 

Latest Trendes

Global market: Distribution of retail sales value by single markets 2011



US National Organic Program (NOP)



- › **US Equivalency arrangements:**
 - › **Canada**

 - › **EU (01.06.2012)**
 - › **Geographical scope: Products grown or imported in US/EU (acceptance of each others imports)**
 - › **Exclusion (complementary certification required)**
 - › **Apples and pears from US**
 - › **Livestock from EU**
 - › **Not in the scope: Wine, Aquaculture**

Concerns EU-US arrangement

- › Variances for additives and aids (baby-food)
- › Fortification (vitamines/minerals)
- ⇒ **Consumer expectation are different in US/EU**
- ⇒ **Changes in US NOP might threaten consumer trust in EU**

- › **Interruption of trade with non-EU/US countries (e.g. Switzerland) ?**
 - › **Products from CH require NOP certification**
 - › **Suppliers from EU to CH have to be NOP certified (e.g. milk powder)**
- ⇒ **Will there be NOP certification in EU?**

Import rules in EU



- › **Recognition of equivalent Third Countries:**
 - › **US** (2012); Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, Switzerland, Tunisia, New Zealand
 - ›
- › **Recognition of **equivalent control bodies** (CB) for operations in Third Countries (since 01.07.2012)**
 - › 53 certification bodies approved
 - › for around 60 countries
- › **Import authorizations expire by 01.07.2014 the latest**
⇒ **How to import from countries or product categories not listed?**

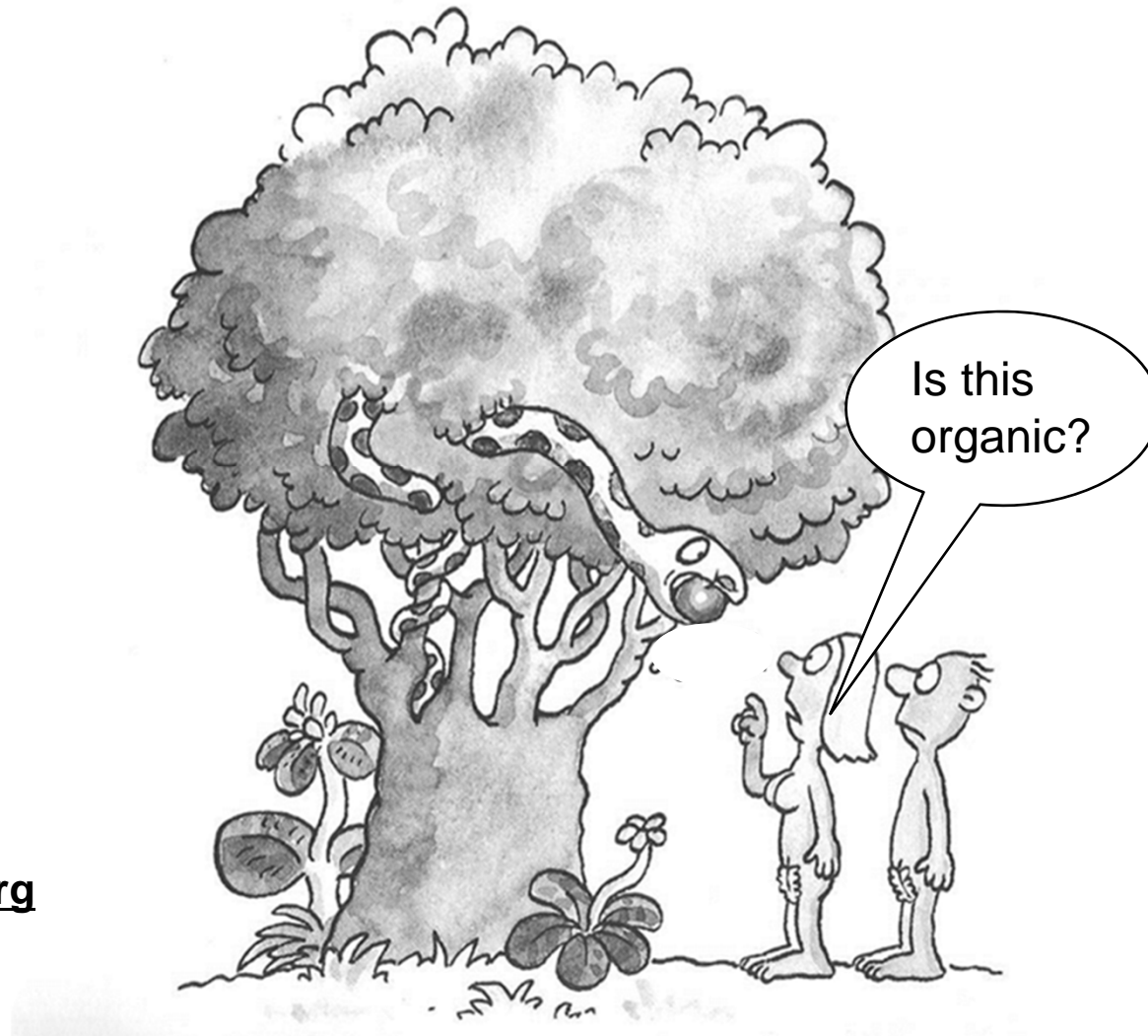
Other developments

- › **Bilateral agreements Canada – Switzerland**
- › **China**
 - › **Certifiers must be CNCA accredited**
 - › **Imports to China require Chinese certification**
 - › **Exports from China require Chinese certification**
- › **Korea's current labeling standards extended until 31.12.2013**

Conclutions

- › **The countries with the largest organic market share (consumption) have mutual recognition arrangements.**
- › **Standard changes in US or EU have direct impact for consumers in other markets.**
- › **Export oriented countries have to adapt to the conditions set.**
- › **A common international understanding on organic (Codex Alimentarius, IFOAM standard) is more important than ever.**

Thank you very much!



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